Electronic Credentialing Request Form (eCRF)

User Manual

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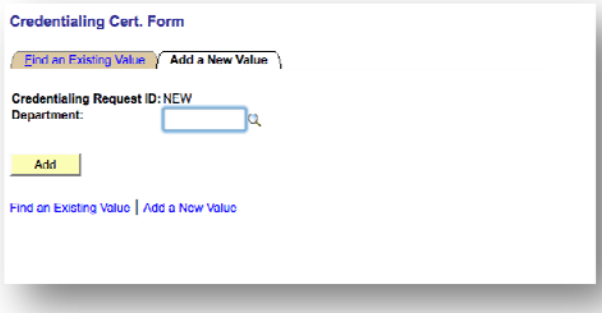
Creating a new electronic Credentialing Request (eCRF)

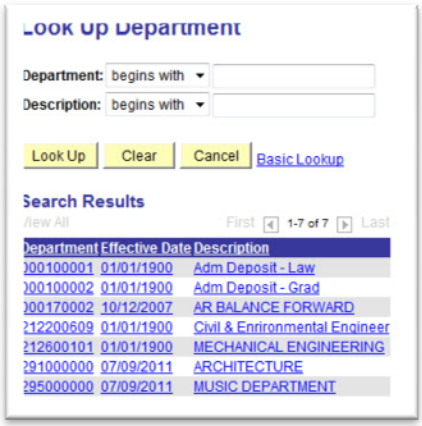
Navigation from PS Campus Solutions: *FIU Custom > Student Records > Use > Credentialing Process > Credentialing & Cert. Form > Add a New Value*

An eCRF is required for all new faculty hired by FIU and/or all instructors who will be assigned as the primary instructor to a course or have a change in instructor's workload not previously requested. This may include admin/staff employees who will now teach for the first time but were not credentialed at the time of hire or GTA's who will be assigned as the instructor of record for a course.

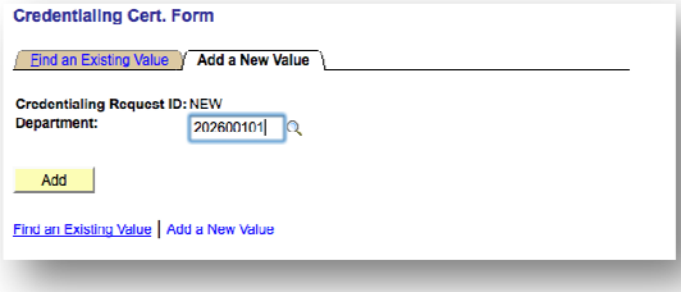
Instructions to create a new CR:

- Follow the navigation above
- Select "***Add a New Value"*** tab
- Search for the department by entering the department ID or by using the *magnifying glass* to search by description. Department should be selected based on where the instructor will teach.





Once the department has been selected, click "***Add"*** to begin the credentialing request.



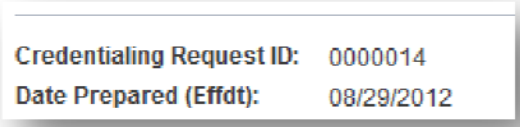
Blank form will appear and details for the credentialing request can now be entered and submitted for all types of appointments.

In order to create and submit an eCRF the following fields are required:

- Employee Type
- Full Name **OR** PID (New hires will not have PID available)
- Question #1
- Question #2
- Question #3
- If applicable, Justification and course objective matrix

If degree is to be entered, the entire row must be completed in order to save or submit the form. If instructor does not possess a degree however will be qualified using one of the options under "*justifications"* then the form will be saved with no entries in the degree field.

Once form is saved a credentialing request ID (CRID) will be issued.



All new faculty hires will require this CRID in the "***Initial Appointment Forms***" in order to verify approval.

Created By: Verson,Ibis M

View/Insert Attachments
View Change History
View/Insert Comments
View Cert History
Print Form

Certification of Credentials Form

Credentialing Request ID: NEW
Date Prepared (Effdt): 08/28/2012
Department: COB School of Accounting
Current Status: New
Workflow Status: Pending Dept Submission

This form documents that faculty being appointed to Florida International University meet the qualifications established by the Southern Association of Colleges and Schools (SACS). This form must be completed by the Department Head, Program Head, or Associate Dean (as appropriate) and approved by the Dean of the College/School. This form must be forwarded to Academic Affairs with the appropriate offer letter and supporting documentation of qualifications.

Employee Type

- ○ Faculty
- ○ Adjunct
- ○ GTA
- ○ Courtesy

PID (If available):

Copy existing degree details

Class Type (If PID Exists):

*First Name:

Middle Name:

*Last Name:

Please list highest degree or Terminal degree first

Customize | Find | First 1 of 1 Last

	*Degree	Degree CIP	Discipline	Country	State	School Code	*Institution Name	Evaluation Required Dt	Evaluation Dt Not Required	Year Acquired	Terminal Degree in the Teaching Field?
1											

Please answer the following questions for all faculty and/or primary instructors:

1. Degree information was obtained from the following:
Please submit official transcript within the first 60 days of hire, for all Faculty or any GTA transcript needed for credentialing not submitted during admission process.

☐ Official Transcript ☐ Unofficial Transcript ☐ Diploma ☐ Vitae ☐ Existing degree details available

2. If highest degree or degree used for credentialing was awarded by an institution in the US, select regional accrediting agency. (GTAs select N/A if submitted during admission process).

☐ N/A ☐ SACS ☐ NCA-HLC ☐ MSCHE ☐ NWCCU ☐ NEASC-CIHE ☐ WASC-ACCJC

3. English is the native language of the appointee. If not, competency in spoken English has been demonstrated to the satisfaction of the Department Head or designee.

☐ Confirmation

If the appointee is to be credentialed by Master's plus 18, please attach the list of 18 graduate credits that relate to each undergraduate course to be taught.

If the appointee is to be justified by exceptional alternative qualifications please complete justification of credentials for each applicable course by selecting below

If teaching, based on credentials above, please list the courses being proposed to be assigned.

Not Teaching: ☐

Customize | Find | First 1 of 1 Last

Seq	*Effdt	Acad Org	Subject	UGRD Only	Catalog Nbr	Course ID	Offer Nbr	Justification
1	08/28/2012			☐				

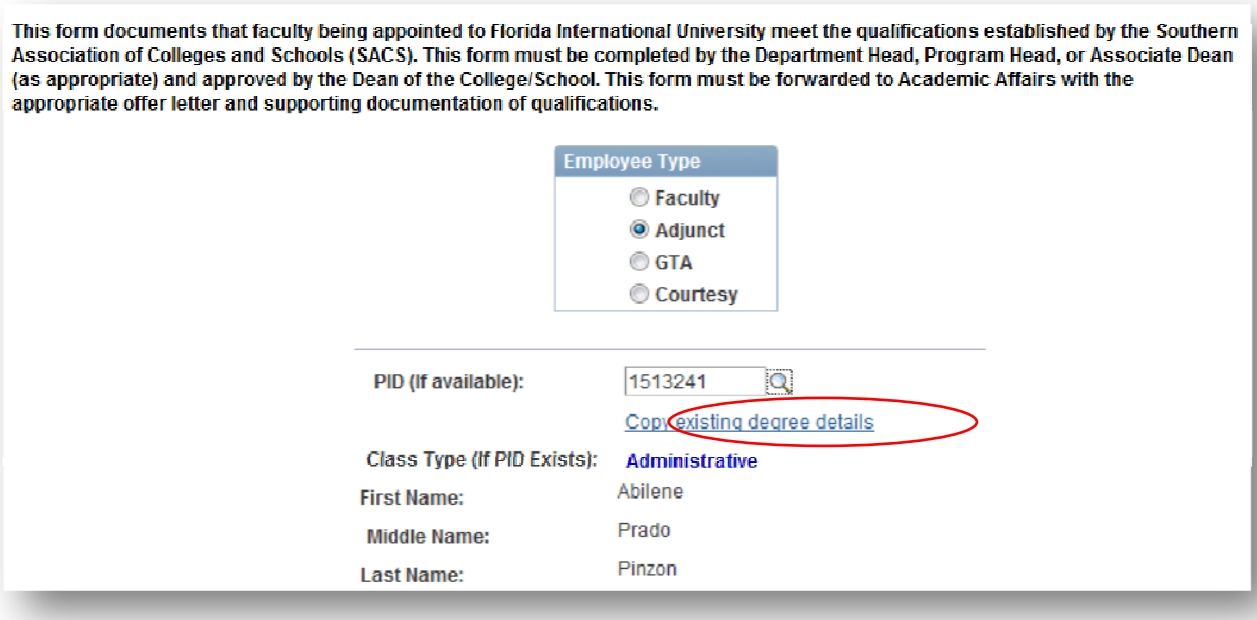
CRID: NEW **Current Status:** New **Workflow Status:** Dept

Save

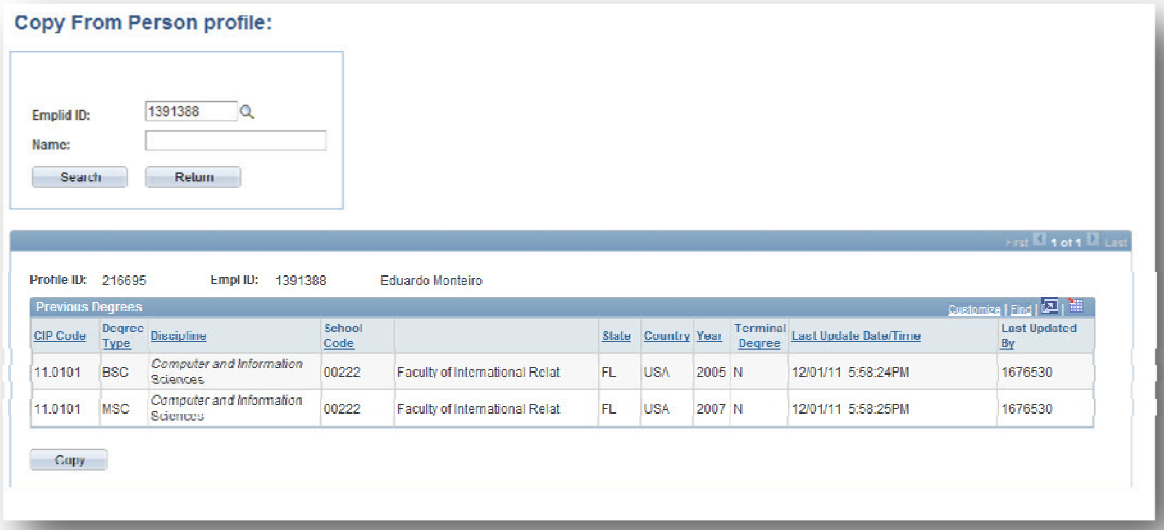
Submit | Approve with Changes
Deny | Pushback
Cancel Form

Electronic Credentialing Request (eCRF) features

Users can now copy any existing degree data from the HR Person Profile.


This form documents that faculty being appointed to Florida International University meet the qualifications established by the Southern Association of Colleges and Schools (SACS). This form must be completed by the Department Head, Program Head, or Associate Dean (as appropriate) and approved by the Dean of the College/School. This form must be forwarded to Academic Affairs with the appropriate offer letter and supporting documentation of qualifications.
Employee Type
Faculty
Adjunct
GTA
Courtesy
PID (If available):
1513241
Copy existing degree details
Class Type (If PID Exists):
Administrative
First Name:
Abilene
Middle Name:
Prado
Last Name:
Pinzon

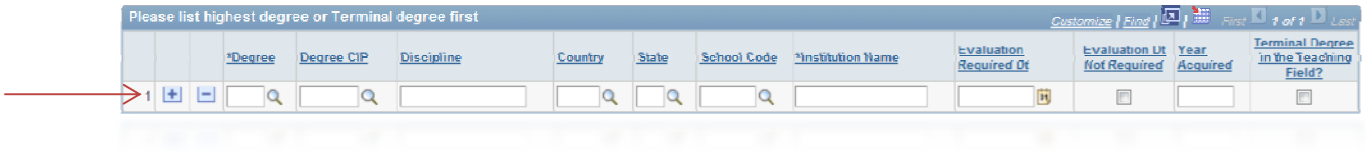
By selecting "***Copy existing degree details***" a new page will appear to search by PID and then the existing degree information will be displayed. Review degree data for accuracy, if any corrections need to be made, do so on the eCRF at this time.



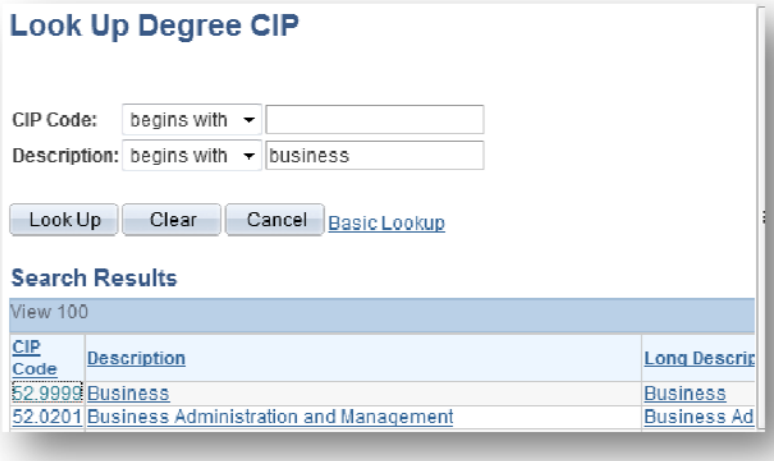
Once the degree information has been verified, you can select "**Copy**" which will transfer the degree information to the eCRF.

If creating an eCRF for a new hire who has never been employeed by FIU or an employee who does not have any degree information available in the HR Person Profile, you can proceed to enter degree data manually. Once the eCRF is approved any new degree information or changes made to the current degree data will be updated automatically with in PSHR's Person Profile education tab.

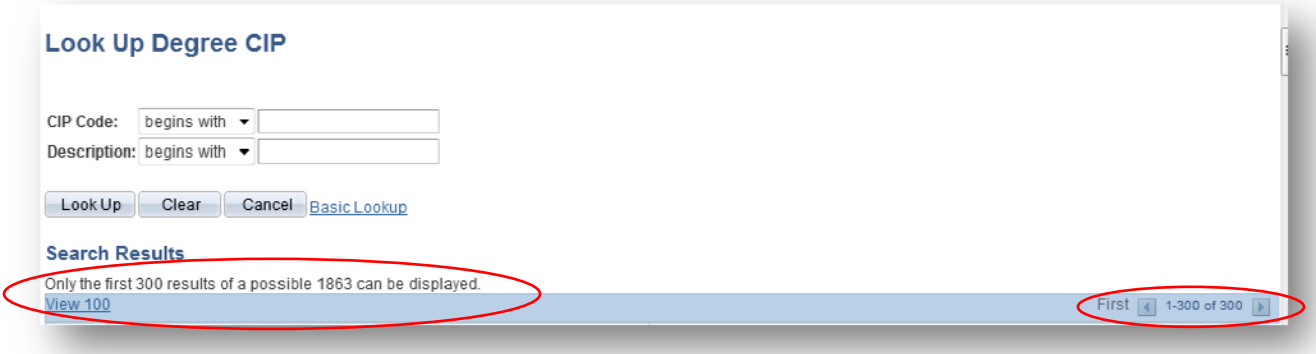
To enter a multiple degrees click on the "**+**" *plus sign.*



After adding the ***degree type***, you will be required to enter a ***degree CIP code*** for all available degree disciplines using the 🔍 *magnifying glass* which will populate the discipline description.

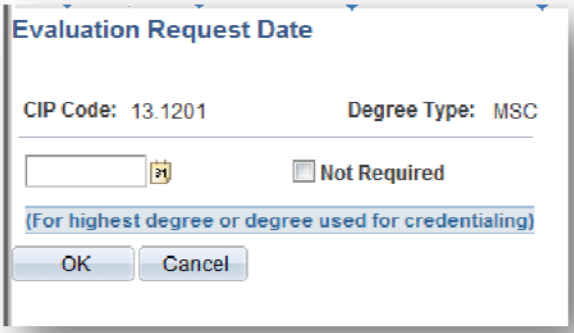


Using the Search criteria is recommended, however if searching through "all" is required, remember that there are multiple pages to the search.



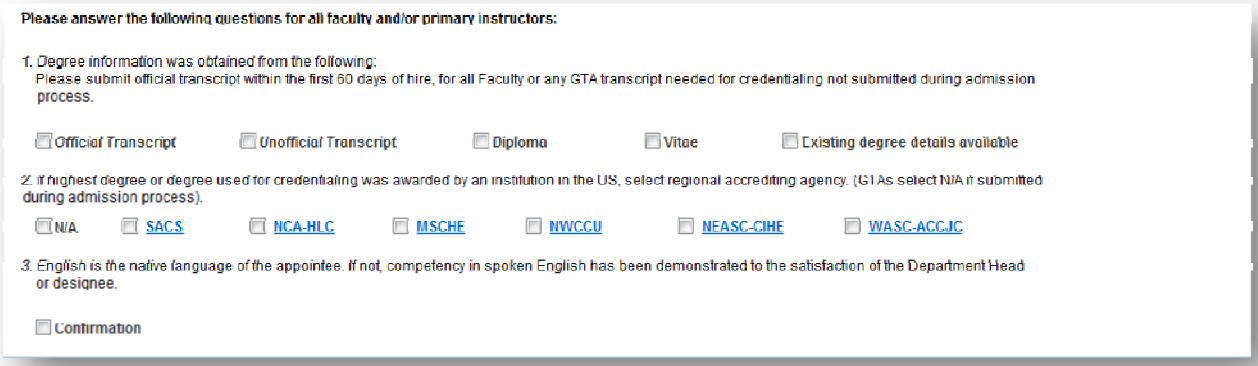
If an appropriate CIP code cannot be determined for a specialized discipline, a space has been provided for the Chair/Dean to assign the appropriate CIP code. Institutions should be selected using the appropriate ***school code***. As the ***Country*** and ***State*** are entered, the search will be filtered using the *magnifying glass* to select from the filtered schools.

If degree is from a foreing institution, a space has been provided in order to enter the school name, if not found in the search. A prompt to enter the ***Evaluation Date*** for the highest degree and/or the degree used for credentialing will be required, you may select N/A for those degrees that do not require an evaluation.



Once ***Degree*** type and ***Degree CIP code*** are selected, the ***Terminal degree in the teaching field*** will be auto populated, if we have established the degree and degree CIP code combination as a Terminal degree.

Proceed to complete the following 3 required questions.


Please answer the following questions for all faculty and/or primary instructors:
1. Degree information was obtained from the following:
Please submit official transcript within the first 60 days of hire, for all Faculty or any GTA transcript needed for credentialing not submitted during admission process.
Official Transcript
Unofficial Transcript
Diploma
Vitae
Existing degree details available
2. If highest degree or degree used for credentialing was awarded by an institution in the US, select regional accrediting agency. (GTAs select N/A if submitted during admission process).
N/A
SACS
NCA-HLC
MSCHE
NWCCU
NEASC-CIHE
WASC-ACCJC
3. English is the native language of the appointee. If not, competency in spoken English has been demonstrated to the satisfaction of the Department Head or designee.
Confirmation

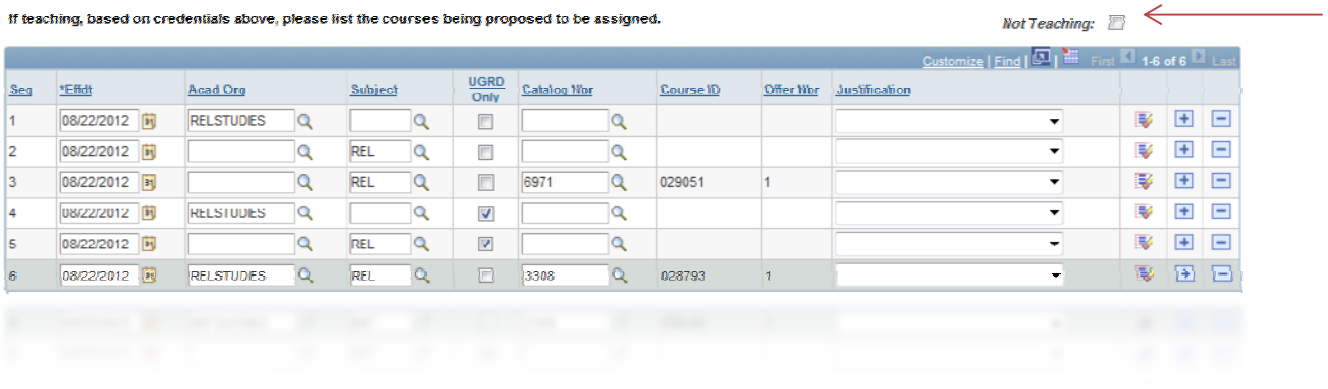
The proposed workload assignment can be requested by selecting on of the following options:

1) Entire departments by using the ***AcadOrg***,

2) All courses with the same prefix by adding the ***Subject Area*** or

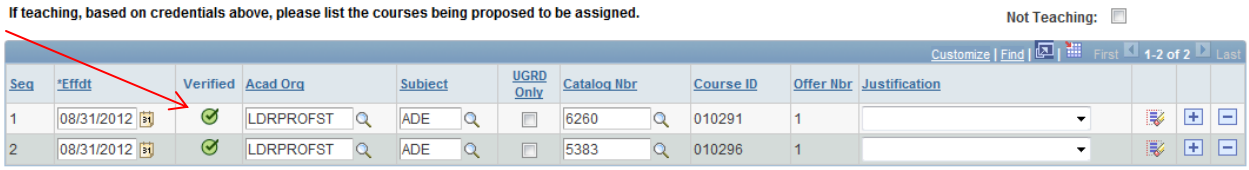
3) Specific courses by entering both ***Subject*** and ***Course Catalog Nbr***

If the faculty is not teaching, you can select the ***Not Teaching*** button.

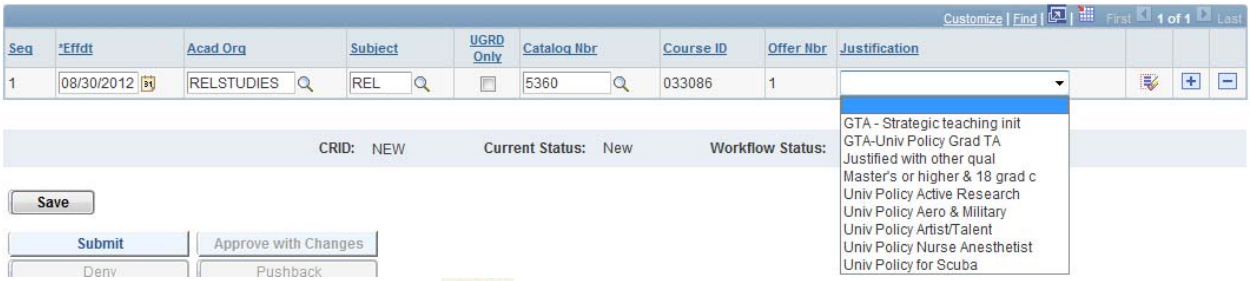

If teaching, based on credentials above, please list the courses being proposed to be assigned.
Not Teaching:
Customize | Find | First 1-6 of 6 Last
Seq *Effdt Acad Org Subject UGRD Only Catalog Nbr Course ID Offer Nbr Justification
1 08/22/2012 RELSTUDIES
2 08/22/2012 REL
3 08/22/2012 REL 6971 029051 1
4 08/22/2012 RELSTUDIES
5 08/22/2012 REL
6 08/22/2012 RELSTUDIES REL 3308 028793 1

Multiple rows requesting different AcagOrg/Prefix/Course can be added as needed.

If adding specific courses, the Subject and Catalog Number are required. Once this information is entered automatic credentialing verification is done based on the established credentialing rules including Degree/CIP match and Related Disciplines. If approved, it will be reflected by the "**verified**" check mark as shown below for each approved course.


If teaching, based on credentials above, please list the courses being proposed to be assigned.
Not Teaching:
Customize | Find | First 1-2 of 2 Last
Seq *Effdt Verified Acad Org Subject UGRD Only Catalog Nbr Course ID Offer Nbr Justification
1 08/31/2012 LDRPROFST ADE 6260 010291 1
2 08/31/2012 LDRPROFST ADE 5383 010296 1

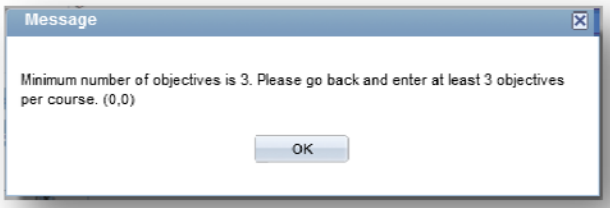
Users have the ability to select the type of justification/exception being used to qualify the instructor or enter course justifications and objectives, by clicking on the drop down *document image.* The Chair/Dean may want to reserve the right to make the selection.


Customize | Find | First 1 of 1 Last
Seq *Effdt Acad Org Subject UGRD Only Catalog Nbr Course ID Offer Nbr Justification
1 08/30/2012 RELSTUDIES REL 5360 033086 1
CRID: NEW Current Status: New Workflow Status:
Save
Submit Approve with Changes
Deny Pushback
GTA - Strategic teaching init
GTA-Univ Policy Grad TA
Justified with other qual
Master's or higher & 18 grad c
Univ Policy Active Research
Univ Policy Aero & Military
Univ Policy Artist/Talent
Univ Policy Nurse Anesthetist
Univ Policy for Scuba

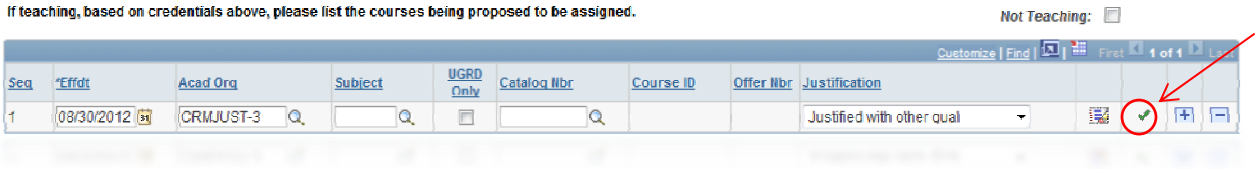
If justification is selected, use the *document image* to prompt a new window which will allow you to enter the justification and course objective matrix details.

Use the "**+**" to enter all three required course objectives and instructor qualifications details.

If ***"Justified w relevant qualification"*** is selected you will be required to complete the justification form and enter at least 3 objectives, if not an error will appear prompting you to complete the form.



Once the appropriate documentation is attached and submitted for those exceptions selected from the drop down menu, a check-mark will appear next to the *document image*.

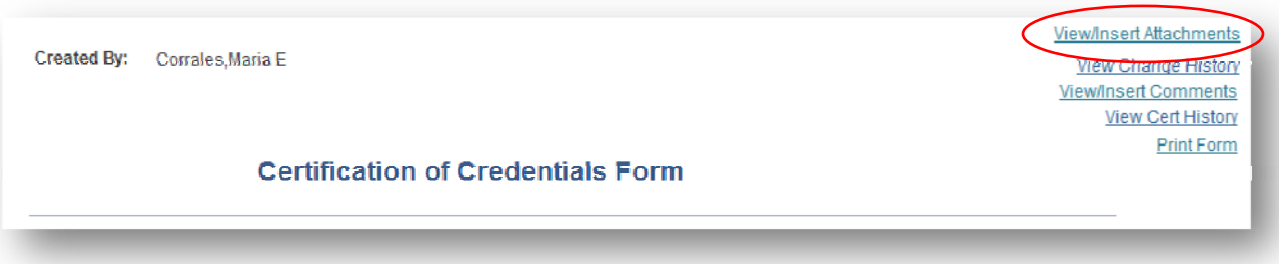


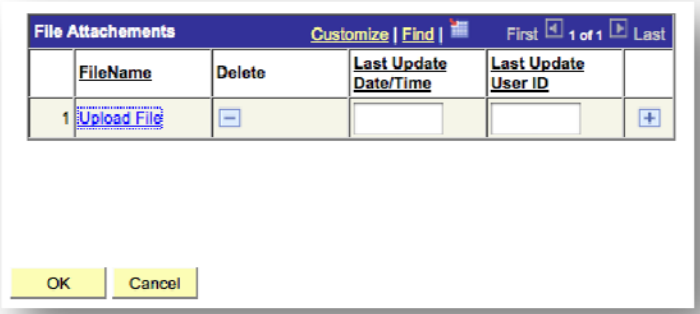
Instructions on the requirements of a justification will become available when cursor hoovers over the "**?**" Instructions

Attachments

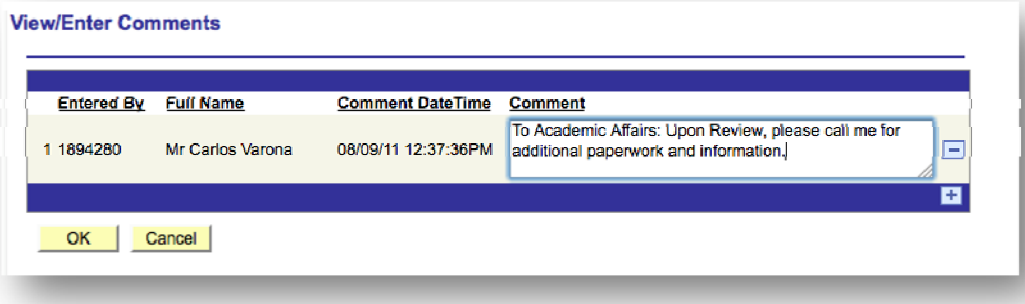
Users are able to view and/or insert attachments.

The Curriculum Vitae (CV) will be required for approval as well as any other supporting documentation.
Ex. Proof of 18 graduate credit hours in the discipline to qualify using the "*Master's or higher & 18 grad hours*" justification.





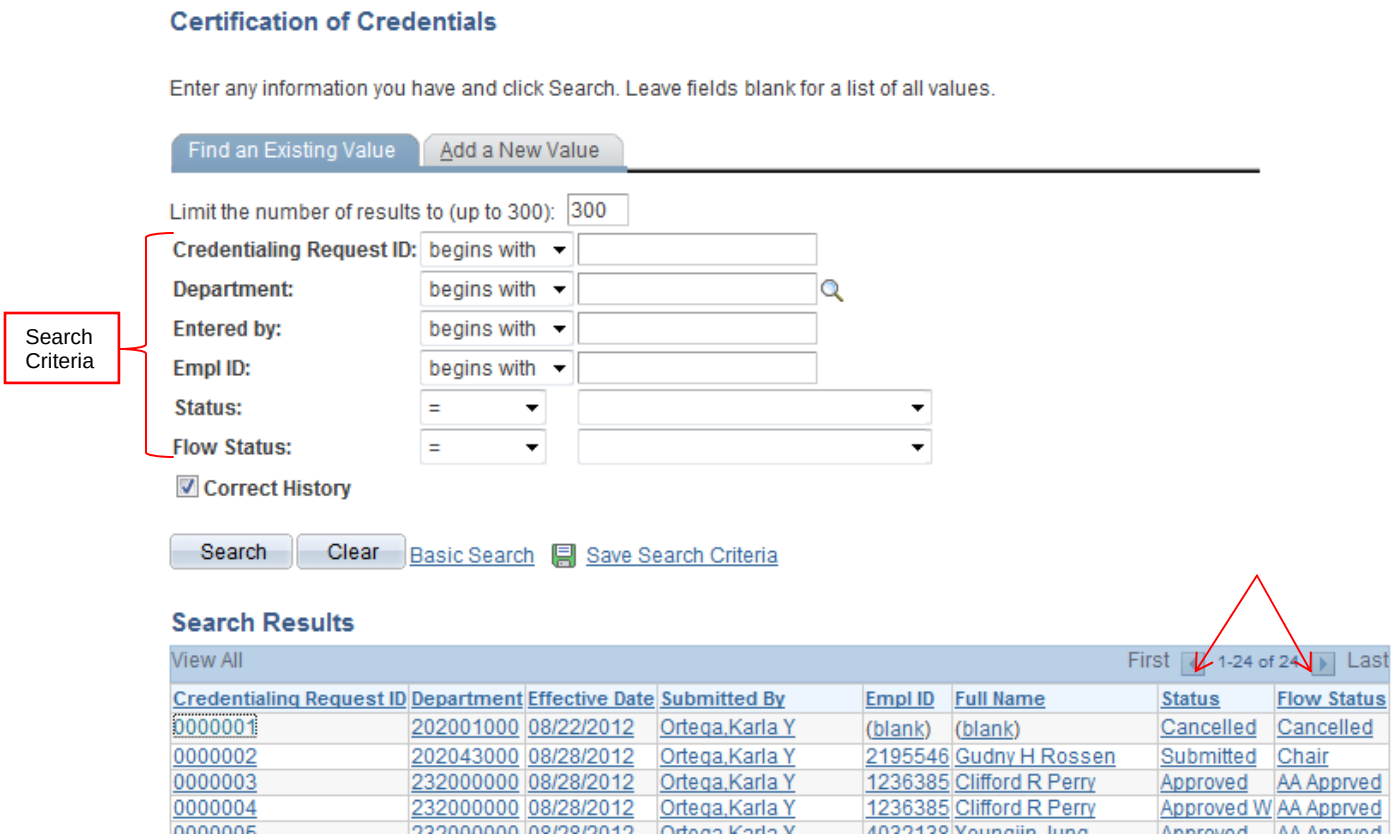
Users are able to view comments from others but can only create and/or update their own eCRF.



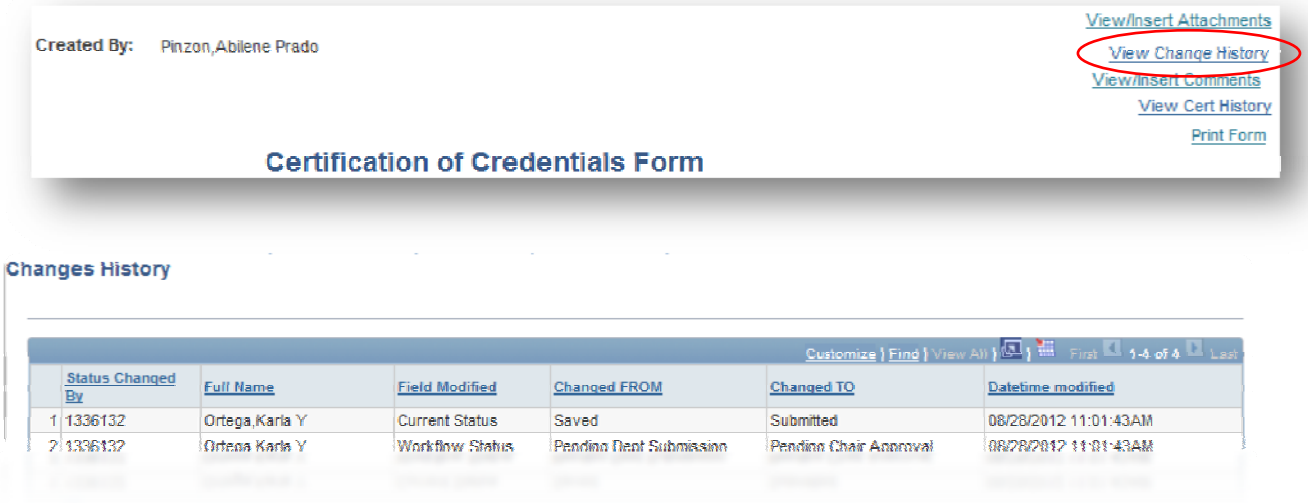
Searching for existing Credentialing Request (eCRF)

Navigation from PS Campus Solutions: *FIU Custom > Student Records > Use > Credentialing Process > Credentialing & Cert. Form*

Users can track the approval process of the eCRF by entering any of the required search criteria. The system will provide the user the ability to view all applicable electronic Credentialing Requests (eCRF) according to the search parameters from any department.


Certification of Credentials
Enter any information you have and click Search. Leave fields blank for a list of all values.
Find an Existing Value
Add a New Value
Limit the number of results to (up to 300): 300
Credentialing Request ID: begins with
Department: begins with
Entered by: begins with
Empl ID: begins with
Status: =
Flow Status: =
Search Criteria
Correct History
Search
Clear
Basic Search
Save Search Criteria
Search Results
View All
First 1-24 of 24 Last
Credentialing Request ID | Department | Effective Date | Submitted By | Empl ID | Full Name | Status | Flow Status
0000001 | 202001000 | 08/22/2012 | Ortega,Karla Y | (blank) | (blank) | Cancelled | Cancelled
0000002 | 202043000 | 08/28/2012 | Ortega,Karla Y | 2195546 | Gudny H Rossen | Submitted | Chair
0000003 | 232000000 | 08/28/2012 | Ortega,Karla Y | 1236385 | Clifford R Perry | Approved | AA Apprved
0000004 | 232000000 | 08/28/2012 | Ortega,Karla Y | 1236385 | Clifford R Perry | Approved W | AA Apprved

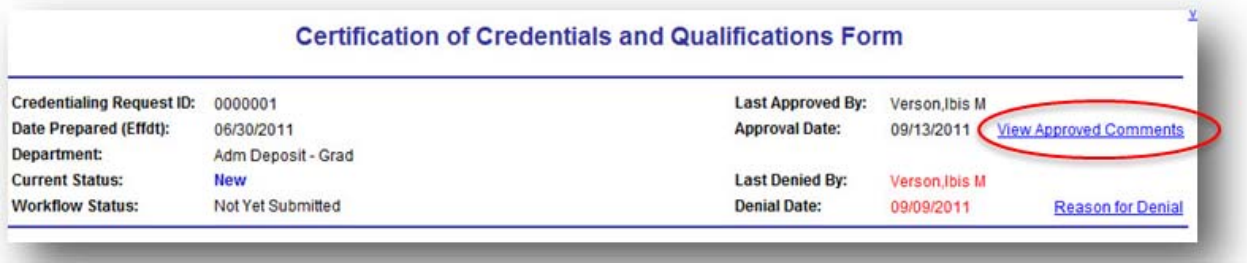
Users can also view the change history of the eCRF through all stages of approvals.

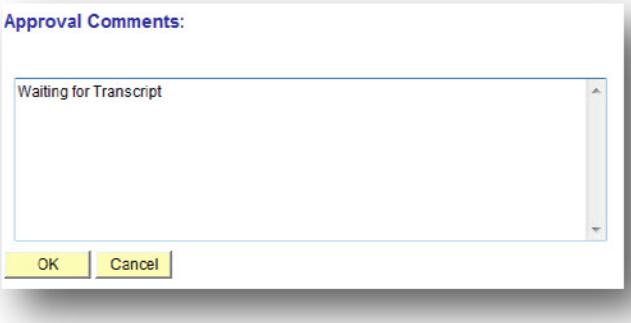

Created By: Pinzon,Abilene Prado
View/Insert Attachments
View Change History
View/Insert Comments
View Cert History
Print Form
Certification of Credentials Form
Changes History
Customize | Find | View All | First 1-4 of 4 Last
Status Changed By | Full Name | Field Modified | Changed FROM | Changed TO | Datetime modified
1 1336132 | Ortega,Karla Y | Current Status | Saved | Submitted | 08/28/2012 11:01:43AM
2 1336132 | Ortega,Karla Y | Workflow Status | Pending Dept Submission | Pending Chair Approval | 08/28/2012 11:01:43AM

eCRF statuses

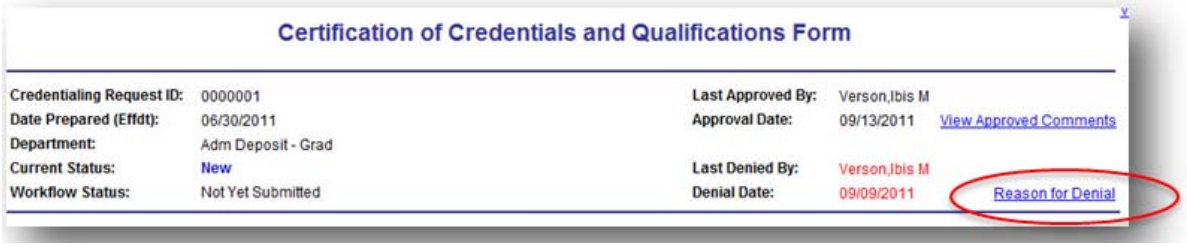
Status Title	Description
New	new eCRF created but not saved (has no CRID #)
Saved	eCRF created and saved for future use but not submitted to department Chair (CRID# created)
Submitted	eCRF submitted from department initiator to department Chair
Pending	eCRF submitted from department Chair to Dean
Approved	eCRF approved by AA
Approved with changes	eCRF approved with changes by AA
Pushback	eCRF sent back to previous approver for edits and can be resubmitted
Denied	eCRF denied and sent back to previous approver. Cannot be revised.
Cancelled	eCRF cancelled and no longer available to update

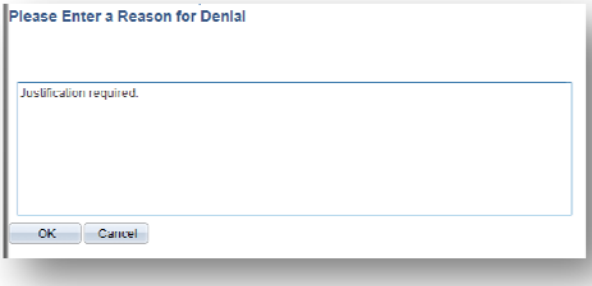
If eCRF was "***Approved with Comments***", the comments will be available next to the name of the last approver who made the changes.


Certification of Credentials and Qualifications Form
Credentialing Request ID: 0000001
Date Prepared (Effdt): 06/30/2011
Department: Adm Deposit - Grad
Current Status: New
Workflow Status: Not Yet Submitted
Last Approved By: Verson,Ibis M
Approval Date: 09/13/2011
View Approved Comments
Last Denied By: Verson,Ibis M
Denial Date: 09/09/2011
Reason for Denial

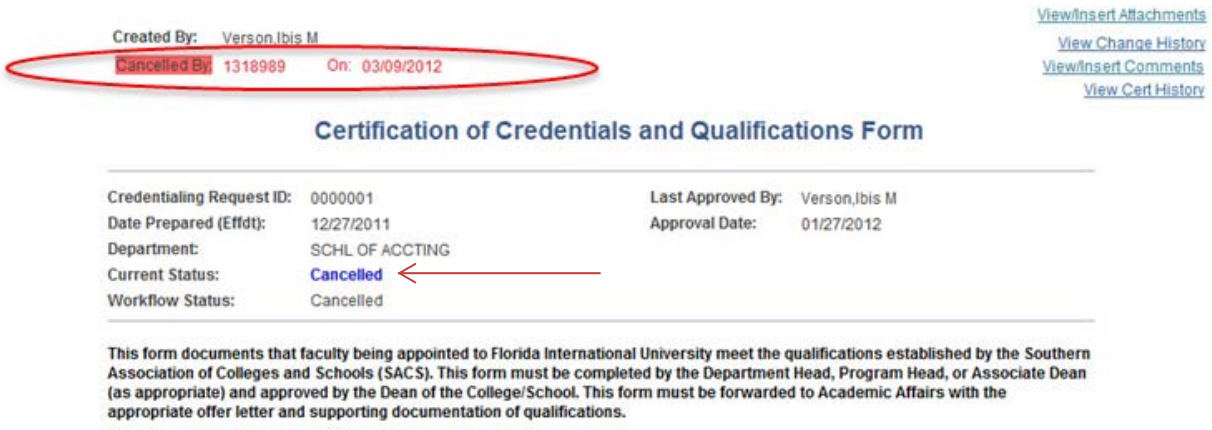


If form was "***Denied***" or "***Pushed Back***," the reason will be available on the form next to the name of the person who denied the form and the comment will also be included in the email notification back to the initiator/department.


Certification of Credentials and Qualifications Form
Credentialing Request ID: 0000001
Date Prepared (Effdt): 06/30/2011
Department: Adm Deposit - Grad
Current Status: New
Workflow Status: Not Yet Submitted
Last Approved By: Verson,Ibis M
Approval Date: 09/13/2011
View Approved Comments
Last Denied By: Verson,Ibis M
Denial Date: 09/09/2011
Reason for Denial

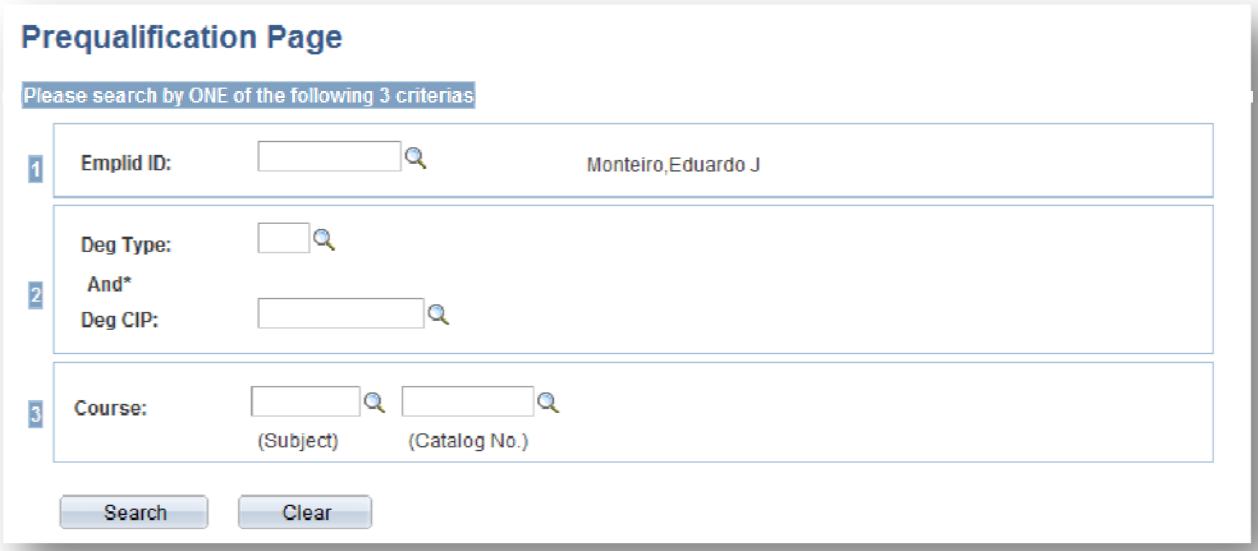


Once the form is cancelled it will show as read-only for all users and will display a message on top that is cancelled.


Created By: Verson,Ibis M
Cancelled By 1318989 On: 03/09/2012
View/Insert Attachments
View Change History
View/Insert Comments
View Cert History
Certification of Credentials and Qualifications Form
Credentialing Request ID: 0000001
Date Prepared (Effdt): 12/27/2011
Department: SCHL OF ACCTING
Current Status: Cancelled
Workflow Status: Cancelled
Last Approved By: Verson,Ibis M
Approval Date: 01/27/2012
This form documents that faculty being appointed to Florida International University meet the qualifications established by the Southern Association of Colleges and Schools (SACS). This form must be completed by the Department Head, Program Head, or Associate Dean (as appropriate) and approved by the Dean of the College/School. This form must be forwarded to Academic Affairs with the appropriate offer letter and supporting documentation of qualifications.

Prequalification Page

Users can now prequalify an instructor for specific courses using the "**Prequalification Page**."



This may be searched using one of the following options:

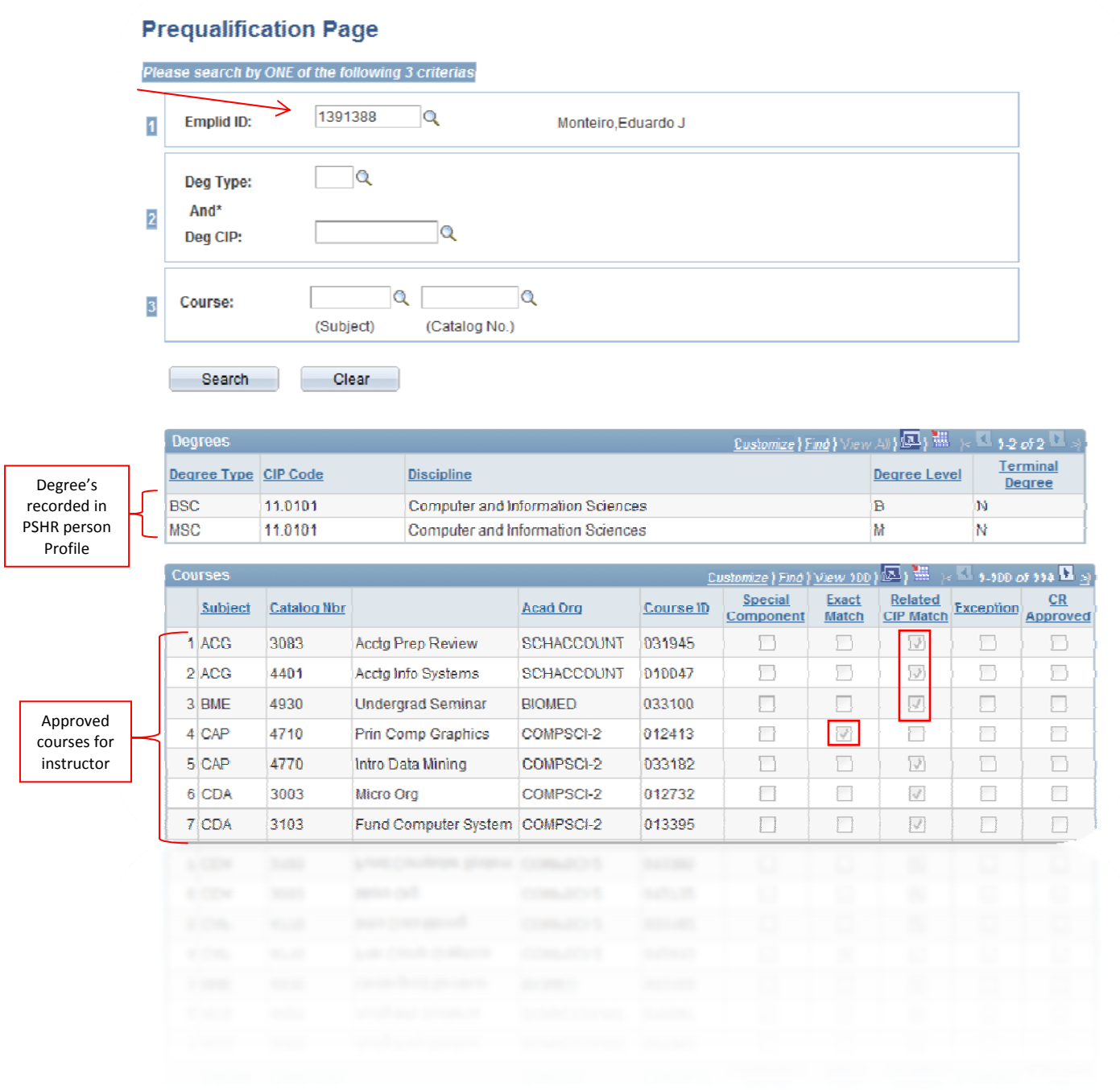
1. Search By PID (example shown below):
    - Once PID is entered all currently existing data based on degree in the PSHR person profile or previously approved credentials will populate.
        - Courses that Directly match with each degree CIP_CODE
        - Courses that match by relative disciplines (CIP_CODE+DEG_TYPE)
        - If previously credentialed, it will check any courses that were marked as Exceptions or AA approved

2. Search By Degree earned (Both degree type and degree CIP code MUST be entered):
    - Enter both degree type and degree CIP code all approved courses will populate:
        - Courses that Directly match with degree CIP_CODE
        - Courses that match by relative disciplines

3. Search By Course (Both subject and catalog number MUST be entered):
    - Will return all possible degrees that will clear to teach the specified course.
        - Directly match with the course CIP_CODE
        - Match by relative disciplines (CIP_CODE+DEG_TYPE)

Results from the prequalification page will run the results in four columns including all the possible clearance types:

1) Special Component (courses that can be taught by PHD/MSC in any discipline)
2) Exact Match of the degree CIP code to the course CIP
3) Related Discipline match
4) Exception (ex. Justification, M+18, Active Research etc.)
5) CR approved (previously approved credential form based on Prefix or AcadOrg).

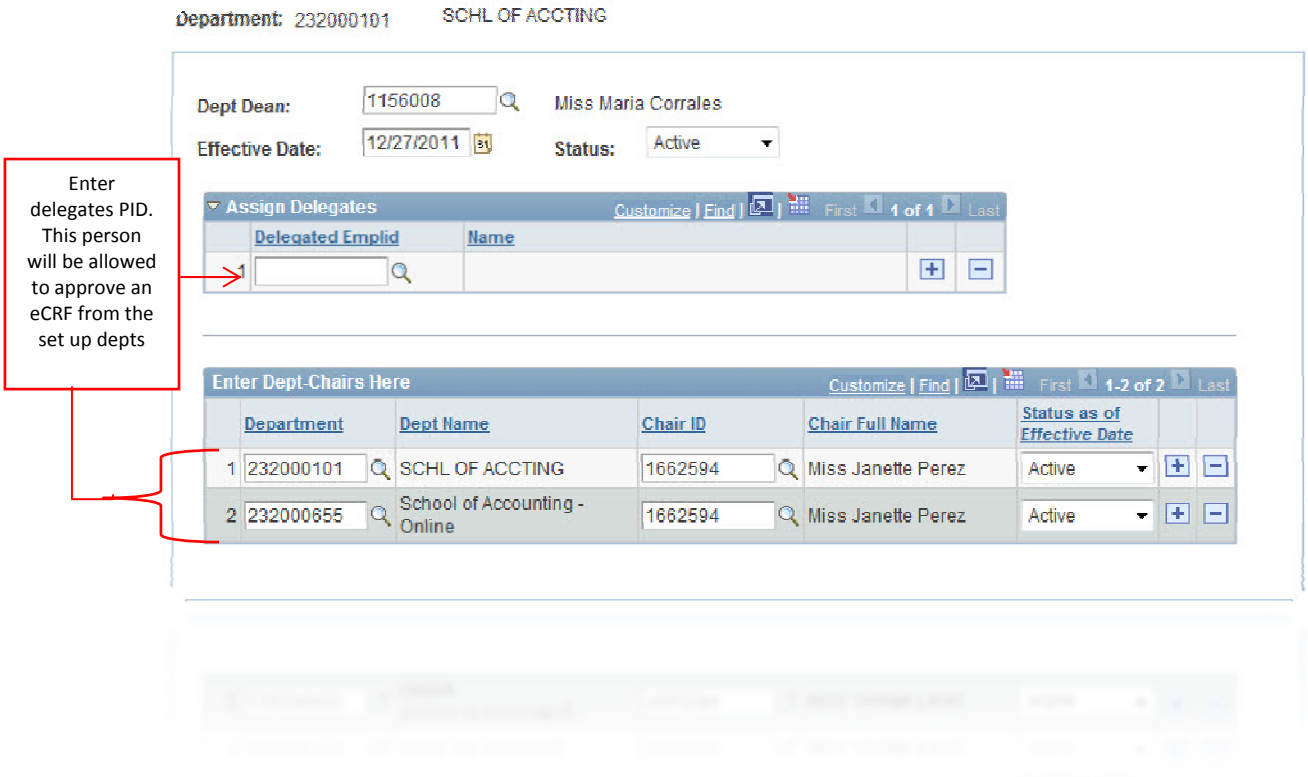


Dean/Chair Set up and Delegation

Navigation: *FIU Custom > Student Records > Setup > Credentialing Process >Dept Dean & Chair Setup.*

Instructions to set up a Dean, Chair, new department or delegate approval authority:

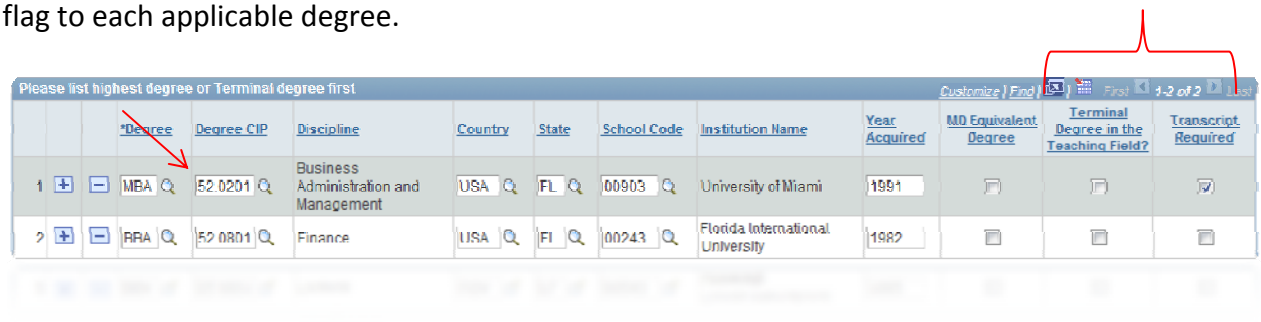
- *Follow the navigation above*
- Select *Add a New Value* tab
- Search for the department by entering the department ID or by using the *magnifying glass* to search by description.
- Confirm dean ID first
- Assign delegates ID in the box provided *if any*
- Setup department head (chair).
- Continue by updating Chair ID based on department or by creating additional underlying departments and chairs as necessary.
- Select Save when complete.


Department: 232000101 SCHL OF ACCTING
Dept Dean: 1156008 Miss Maria Corrales
Effective Date: 12/27/2011 Status: Active
Assign Delegates
Customize | Find | First 1 of 1 Last
Delegated Emplid
Name
Enter delegates PID. This person will be allowed to approve an eCRF from the set up depts
Enter Dept-Chairs Here
Customize | Find | First 1-2 of 2 Last
Department
Dept Name
Chair ID
Chair Full Name
Status as of Effective Date
1 232000101 SCHL OF ACCTING 1662594 Miss Janette Perez Active
2 232000655 School of Accounting - Online 1662594 Miss Janette Perez Active

Approver (Chair/Dean/AA)

As approvers you will have access to the eCRF at a higher level than the initiator role. As an approver you can initiate an eCRF and self-approve based on your role. For example, a dean can create and approve an eCRF as Chair and as Dean (approving twice) and will continue through the workflow for AA approval.

When reviewing the credential request form, it will be the responsibility of the Chair and Dean to confirm the *Degree CIP code* and mark off the *Terminal Degree* flag or *Transcript required* flag to each applicable degree.


Please list highest degree or Terminal degree first
Customize | Find | First 1-2 of 2 Last
*Degree
Degree CIP
Discipline
Country
State
School Code
Institution Name
Year Acquired
MD Equivalent Degree
Terminal Degree in the Teaching Field?
Transcript Required
1 MBA 52.0201 Business Administration and Management USA FL 00903 University of Miami 1991
2 BBA 52.0801 Finance USA FL 00243 Florida International University 1982

The proposed workload assignment can be requested be selecting one of the following:

1) Entire departments by using the ***AcadOrg***,
2) All courses with the same prefix by adding the ***Subject Area*** or
3) Specific courses by entering both ***Subject*** and ***Course Catalog Nbr***

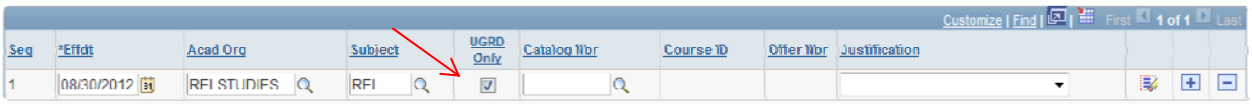
1) Entire departments by using the ***Academic Org***

This option should be used only for those terminal degrees in the field that will automatically clear to teach any course in the department.

Ex. PHS in Psychology can teach any course in the Psychology department.

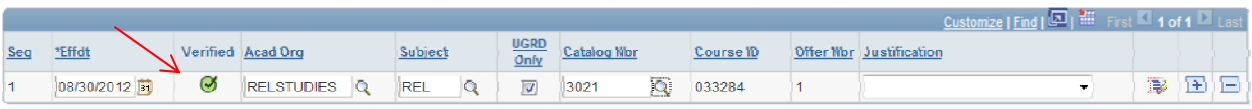
2) Prefix only by adding the ***Subject Area***

When this option is selected you may select the *UGRD Only* box of only undergraduate course should be allowed.



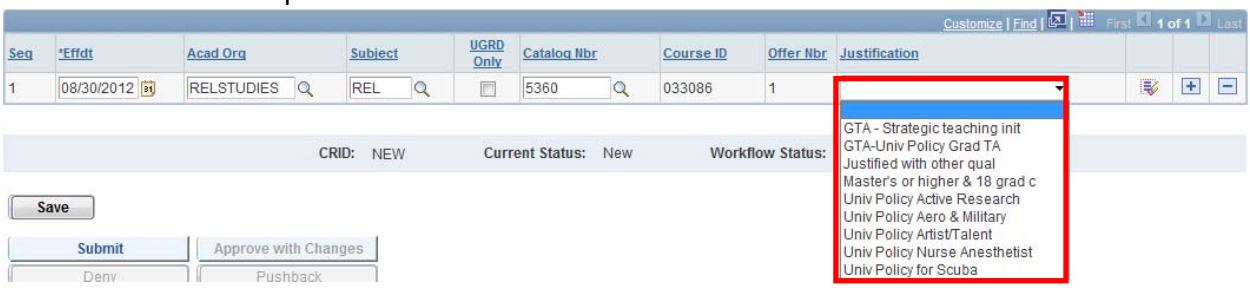
3) Specific course by entering both ***Subject*** and ***Course Catalog Nbr***

When this option is selected an automatic credentialing verification is done based on the established credentialing rules including Degree/CIP match and Related Disciplines. If approved, it will be reflected by the verified check below for each approved course.

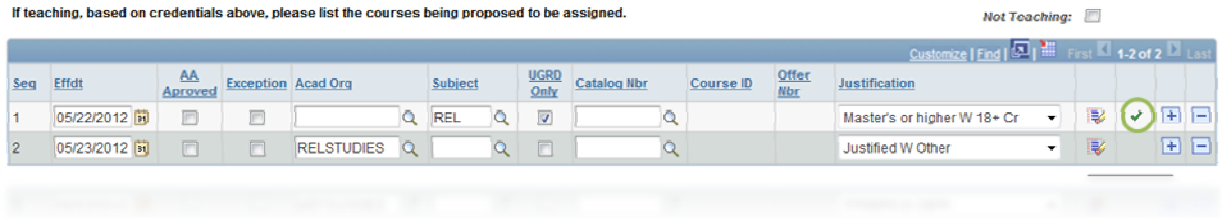


Justifications and Exceptions

FIU has established a set of justifications for our faculty which include the "***Master's or higher plus 18 graduate credit/hours"*** and the "***FIU policy for Active Research"*** which can now be selected from the drop down menu.

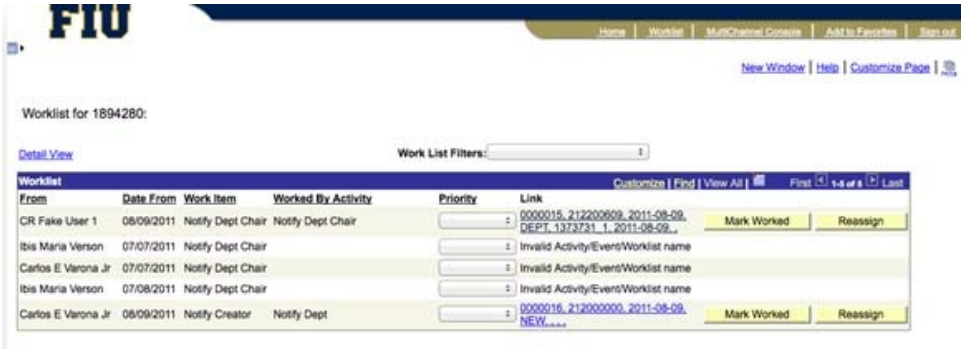


If clearance is based on "***Justified with other qualification"***, you will be required to complete the justification form and enter at least 3 objectives. If these are not entered, an error will appear prompting you to complete the form. Once the justification is complete a check-mark will appear next to the button.

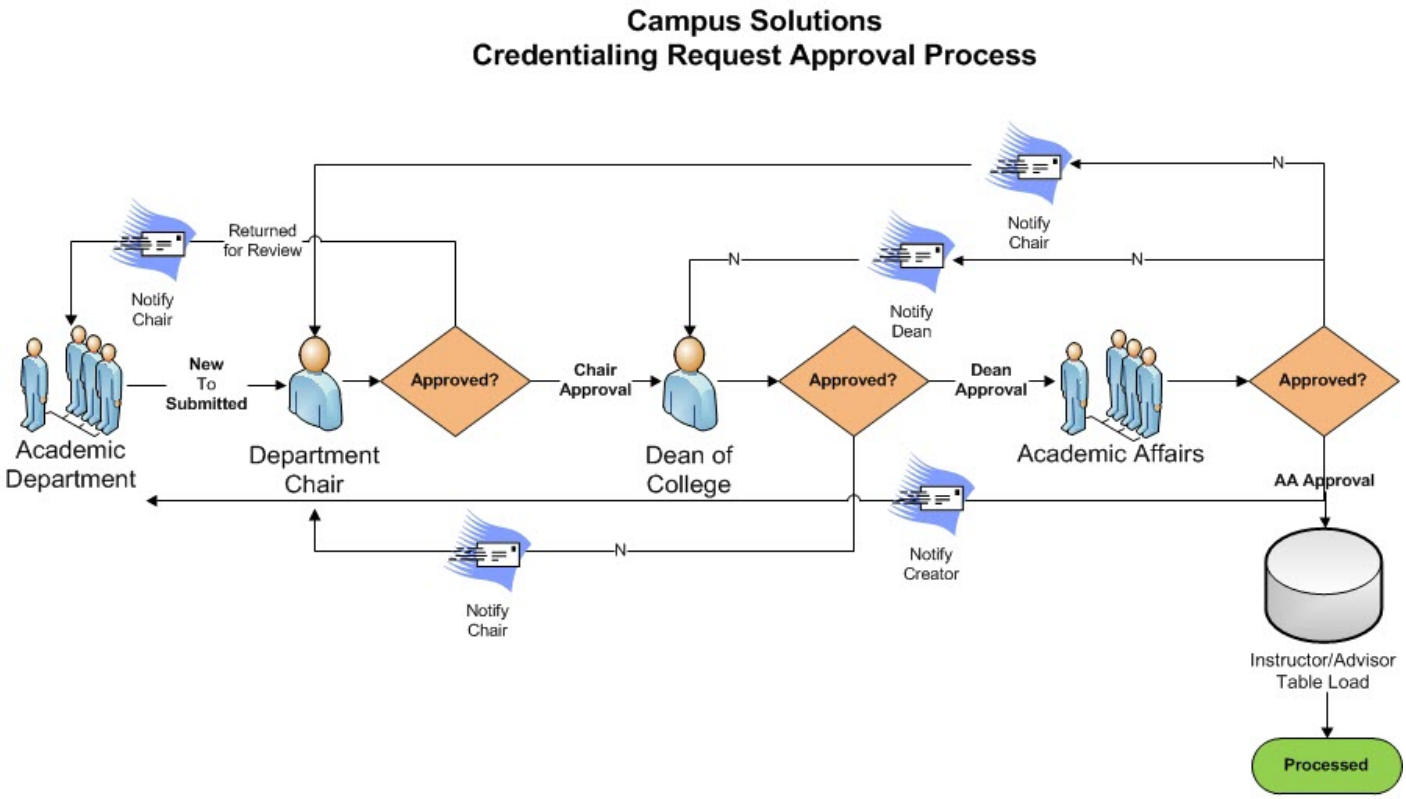


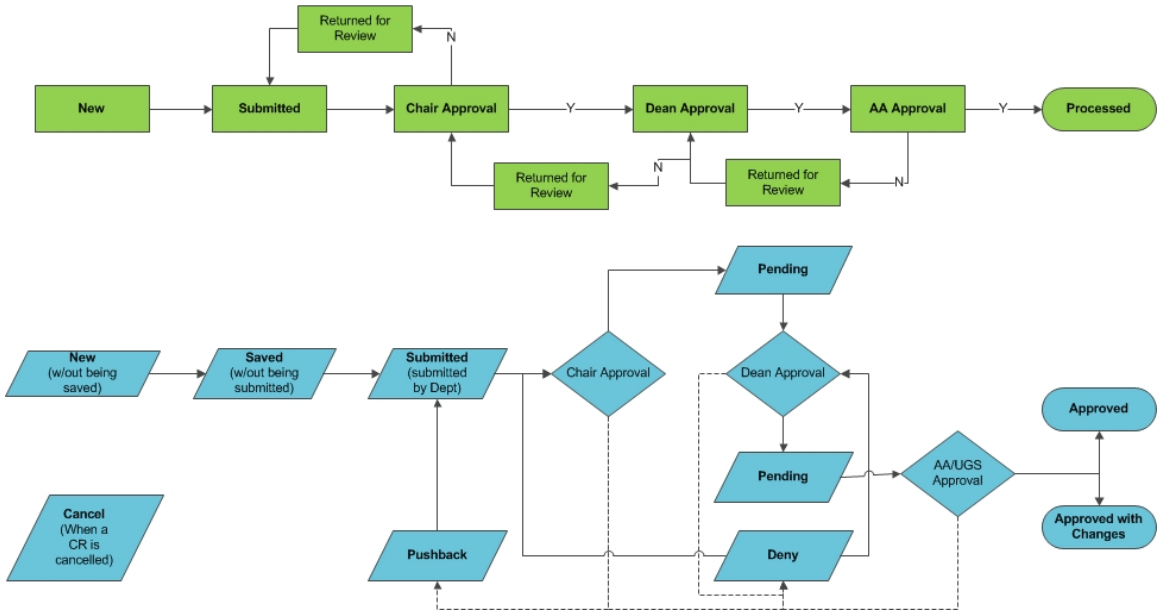
Worklist

All pending eCRF transactions will be available in the ***Worklist*** for Chair role/Dean role/Academic Affairs. Until the eCRF is approved, the link will continue to appear on the ***Worklist***, however once approved, the link will be automatically removed from the ***Worklist***.


FIU
Home | Worklist | MultiChannel Console | Add to Favorites | Sign out
New Window | Help | Customize Page
Worklist for 1894280:
Detail View
Work List Filters:
Worklist
Customize | Find | View All | First 1-6 of 6 Last
From
Date From
Work Item
Worked By Activity
Priority
Link
CR Fake User 1 08/09/2011 Notify Dept Chair Notify Dept Chair
Mark Worked
Reassign
Ibis Maria Verson 07/07/2011 Notify Dept Chair
Invalid Activity/Event/Worklist name
Carlos E Varona Jr 07/07/2011 Notify Dept Chair
Invalid Activity/Event/Worklist name
Ibis Maria Verson 07/08/2011 Notify Dept Chair
Invalid Activity/Event/Worklist name
Carlos E Varona Jr 08/09/2011 Notify Creator Notify Dept
Mark Worked
Reassign

Workflow Routing & Setups


Campus Solutions
Credentialing Request Approval Process
Notify Chair
Returned for Review
Notify Chair
N
Notify Dean
N
N
Academic Department
New To Submitted
Department Chair
Approved?
Chair Approval
Dean of College
Approved?
Dean Approval
Academic Affairs
Approved?
AA Approval
Notify Creator
Notify Chair
N
Instructor/Advisor Table Load
Processed


Workflow & Status Process
Returned for Review
N
New
Submitted
Chair Approval
Y
Dean Approval
Y
AA Approval
Y
Processed
Returned for Review
N
Returned for Review
N
Pending
New (w/out being saved)
Saved (w/out being submitted)
Submitted (submitted by Dept)
Chair Approval
Dean Approval
Approved
Pending
AA/UGS Approval
Cancel (When a CR is cancelled)
Pushback
Deny
Approved with Changes

Queries

The following queries have been created for public use to assist in day-to-day process.

Instruction on running queries:

- Follow the navigation above
- Search by Query name
- Enter Query name from list below

Query Name	Description
GET_CR_DEGREES_NON_TERMINAL	Returns all degrees marked as “required” but not marked as terminal
GET_CR_DEGREES_WITH_FOREIGN	Returns all degrees marked as “required” with foreign institutions
GET_CR_DEGREES_WITH_TRANSCRIPT	Returns all degrees marked as “required”
GET_CR_DEGREES_YEAR_AQUIRED	Returns all degrees with year acquired >= current date
GET_CR_EXPIRED_CRSES_FA_ADJ	Returns all courses for Credentialed instructors as faculty or adjunct that have expired.(is 7 years after the effective date for Faculty and 5 years from the effective date for adjuncts)